

Marketing Pro Ads Setup Guide: Connecting Web Forms to ServiceTitan

The ServiceTitan Marketing Pro team has a few options for you to connect your web form/booking solution to your ServiceTitan account.

Background

There are a variety of ways that a marketing lead can make its way into ServiceTitan. Web forms, booking schedulers, call tracking numbers, web chats, and third-party lead aggregators are some of the more commonly used lead capture methods.

ServiceTitan has received two frequent requests from customers with regards to integrating their lead capture sources with ServiceTitan:

- Capture the lead information in ServiceTitan
- Have a way to assign the marketing attribution to that lead

To facilitate these requests, we have opened our marketing API to receive leads and their associated attribution information. This can be performed in one of two ways:

- 1) Connect your forms via Zapier.
- 2) Build a direct integration through our API. To use this, a developer familiar with API post-calls will be required to help build a bridge between your lead generation tool and ServiceTitan.

The Zapier Method

These instructions are written with the assumption that you have:

- 1) Marketing Pro Ads
- 2) A paid Zapier subscription



Step 1 - Access ServiceTitan's Zapier integration

Gain access to the Zapier 3.0 app from the ServiceTitan integrations team. You can do so using this form. If you have previously integrated Zapier with ServiceTitan, you won't need to do this step. Await confirmation from the Integrations team before continuing to Step 2.

Step 2 - Connect ServiceTitan to Zapier

In Zapier, navigate to My Apps -> Add Connection

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Search for ServiceTitan and click on it.





This will open a new tab with fields to populate.

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	Allow Zapier to access your	
	ServiceTitan Account?	
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	For more information visit https://developer.servicetitan.io/docs/get-going- manage-client-id-and-secret/	
	Client ID (required)	
	For more information visit https://developer.servicetitan.io/docs/get-going- manage-client-id-and-secret/	
	Client Secret (required)	
	For more information visit https://developer.servicetitan.lo/docs/get-going- manage-client-id-and-secret/	
	Environment (review)	
	Environment to use.	
	Yes, Continue to ServiceTitan Cancel	

Keep this tab open, and now navigate to your ServiceTitan account -> Settings -> Integrations -> API Application Access



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Click on "Connect New App", then add Zapier 3.0

Note: if you don't see this option, that means something went wrong with step one. If you had previously setup Zapier 2.0, then 3.0 should appear automatically in your account.

Scroll to the bottom and set the restriction fields to "No restriction". Then, click "Allow Access".

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This will open up a screen that has some of the information Zapier was asking for. Copy and paste over the Tenant ID and Client ID.

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Then, click on "Generate" under Client Secret and copy and paste the generated code over as well.

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Note: this client secret is visible only once. If you should need to view it again, you'll n generate a new secret. Client Secret	eed to
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	Close

On the Zapier screen, choose "Production" environment and then click "Yes, Continue to ServiceTitan."



Step 3 - Build Your Zaps

Lead Form Zap

Before you can receive Lead forms in ServiceTitan, you need to have the "Create Leads from unbooked calls and bookings" feature enabled in your account. You can tell that this is enabled if you see a "Leads" section under the Follow Up tab in your ServiceTitan account. If you do not have this feature enabled, ask your Customer Support Manager to enable it for you. Make sure you review this document and familiarize yourself and your staff with how this feature works.

The CSR workflow will change when this integration is complete. It should look like this:

- An email is received with the form submission details (should be no change here)
- The CSR navigates to the Follow Up -> Leads tab in ServiceTitan
- Adjust the Follow Up End date to include tomorrow
- Find and click on the lead that matches the form
- Call/message the lead from this screen. If a job is booked, they should click "Convert Lead" from the Leads tab, which will transfer the Lead to the job booking screen with all attribution/campaign information pre-populated.
- Note: there is a current bug that doesn't bring the name and email over to the booking screen, so they will need to re-enter this information using the content from the Leads tab or the email with the submission data. This will be resolved soon.

Lead Form Zap - Step 1

Configure your webform to track URL parameters.

The core functions of this feature are to: A) Send lead forms into ServiceTitan, and B) Assign the correct marketing attribution to that lead.

In order to assign marketing attribution, we first need to capture it from the URL of the form submitter.

This is typically done using "Hidden Fields". This works by having your form track information from the URL, then submit it along with the filled-out form. The fields that need to be populated are: Utm_source Utm_medium

Utm_campaign

GCLID

FBCLID (can't be used now, but will be available soon so it's a good idea to set up now) MSKLID (can't be used now, but will be available soon so it's a good idea to set up now)



Each form provider has their own way of doing this. Try and find your form solution's documentation for storing URL parameters as hidden fields. You will likely need a web developer to accomplish this. Here are a few common ones:

<u>Gravity Forms</u> <u>Jotform</u> <u>Wufoo</u> <u>WPForms</u>

Note: if you can extract this information from a chat software, you can also send chat conversations and attribution using this method.

Lead Form Zap - Step 2

Create a new Zap, with the Trigger being a form submission from your form software. Make sure to test the Zap to ensure that it can pull form submissions successfully.

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Lead Form Zap - Step 3

Create a new Action step in the Zap, choosing ServiceTitan as the app.

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Action 2. Create Lead Form in ServiceTitan	
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* Event (required)	
Create Lead Form	\$
This is performed when the Zap runs.	
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For the action, select "Create Lead Form"

Populate every field possible, using custom fields that pull from the responses in your form software trigger zap. Note that address is optional as most web lead forms don't ask for it.

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Test the Zap. This should send a new Lead under the "Leads" section of the Follow Up tab in ServiceTitan. By default, the Follow Up date will be the day after the lead is created, so make sure you adjust the "Follow Up End" date to see your new leads.

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Lead Form Zap - Step 4

Create another ServiceTitan action step, and for the action choose "Create Lead Attribution Form". This step will assign the campaign and marketing attribution to the Lead we created in Step 3.



Note that when filling out the fields, you will get the Lead ID as the output of Step 2.

Landing page URL is the page that the website is on.



Referrer URL is the page that brought the user to the site, often something like google.com or yelp.com.

Google click identifier is the same as GCLID.

Google Analytics id is the ClientID for the session, not the code of the property, This is an optional field but helpful if you can get it.

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Test this step by first using manually entered parameters for the "Source" and "Medium fields, instead of pulling from your form software. For Source, use "yelp". For Medium, use "referral". This should populate the Lead's campaign with a campaign of "Yelp Referral Traffic", which means the integration is working (you may have to give it a few minutes). Once it works, change these fields back to dynamically pull the values from Step 1.

Lead Form Zap - Step 5

Set the Zap live and monitor Zapier closely for the next few days, ensuring it is working as expected.



3rd-Party Call Tracking Zap

If there is some reason that you cannot adopt ServiceTitan's DNI call tracking system, you can still experience the benefits of it by integrating your current solution into Marketing Pro. Note: this will only work if the Marketing Pro Ads Measurement feature is enabled in the ServiceTitan account.

This will work by sending attribution information into ServiceTitan once a call is completed.

The API Method

Note: This will only work if the Marketing Ads feature is enabled in the ServiceTitan account, which is part of Marketing Pro.

This will need to be performed by someone with experience developing into APIs. They will need to complete the following steps:

- Get developer access to ServiceTitan
- Build an "App" in ServiceTitan, which is essentially the connection between the two platforms
- Design the App to send information from your lead capture tool into ServiceTitan
- Test the App in the Integration environment to make sure it's receiving the leads
- Enhance the integration to also receive marketing attribution data for each lead
- Test the attribution portion in the Production environment Integratino environment won't work) to ensure all information is flowing properly

Whether trying to connect a form software like Gravity Forms, a booking software like Schedule Engine, a chat service like Ruby chat, or a call tracking solution like CallRail, ServiceTitan can receive those leads and bookings and receive all marketing attribution through this method.

Getting started

If you are not familiar with the ST API, read and follow these instructions:

https://developer.servicetitan.io/docs/welcome/

- 1. Make sure to read "Welcome" through "Get Going"
 - a. For making API requests please follow this guide: <u>https://developer.servicetitan.io/docs/get-going-first-api-call/</u>



- 2. Make sure you create an app in both the integration and production environments
- 3. Make sure to read the CRM reference guide:
 - a. https://developer.servicetitan.io/docs/api-resources-crm/

Integrating your web forms

- 1. To integrate your booking forms (i.e. Schedule Engine), use this endpoint:
 - a. <u>https://developer.servicetitan.io/api-details/#api=tenant-crm-v2&operation=Bookin</u> <u>gs_Create</u>
 - b. When setting things up to test, use the "integration" endpoint
 - c. When finalizing, use the "production" endpoint
- 2. To integrate your lead form (i.e. contact form on a website), use this endpoint:
 - a. <u>https://developer.servicetitan.io/api-details/#api=tenant-crm-v2&operation=Leads</u> <u>SubmitLeadForm</u>
 - b. When setting things up to test, use the "integration" endpoint
 - c. When finalizing, use the "production" endpoint

Adding marketing attribution post calls

Overview: external attribution API

The external attribution api post calls allow integrations to post calls from external tracking software into the Marketing Ads attribution system.

It is assumed that the external software tracks conversions at the visitor level which means that visitor session information is also bundled with calls.

Session information consists of utm parameters, click ids and other parameters which are later utilized by the Marketing Ads attribution system.

The external attribution API post calls are exposed as ServiceTitan Public API V2 endpoints.

We have three types of post calls:

- 1. External Call Attribution for external call tracking solutions (not relevant for forms/bookings)
- 2. Booking form attribution for integrated booking request solutions
- 3. Lead form attribution for integrated lead / contact forms



Sending attribution post-calls

Important Note: You can only use the "production" endpoint for marketing attribution

- 1. When setting up booking forms, use this endpoint:
 - a. <u>https://developer.servicetitan.io/api-details/#api=tenant-marketing-ads-v2&operation=WebBookingAttributions_Create</u>
 - b. You will need to use the booking ID for the booking you created in step 2a of integrating web forms (above)
- 2. When setting up lead forms, use this endpoint:
 - a. <u>https://developer.servicetitan.io/api-details/#api=tenant-marketing-ads-v2&operation=WebLeadFormAttributions_Create</u>
 - b. You will need to use the lead ID for the lead you created in step 2b of integrating web forms (above)